



Strategic
Marketing &
Research, Inc.

Travel Montana

Conversion Research

Prepared for Mercury Advertising

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Background & Objectives

Travel Montana, in concert with its agency, Mercury Advertising, is in the process of re-evaluating much of the State's tourism marketing. To date, three particular considerations have emerged from the initial re-evaluation: 1) future efforts will focus in part on the geo-tourist segment; 2) the decline in visitation to Montana as a final leisure destination needs to be reversed and travel considered "pass-through" (which means Montana was part of a larger western vacation) needs to increase, and, 3) greater insight is needed relative to first-time visitors. Additionally, Travel Montana is interested in tracking conversion & visitor preferences from their Montanakids.com effort. While these issues certainly need to be addressed, the effectiveness of previous marketing endeavors, specifically the warm season magazine campaign, needs to be identified as part of an ongoing performance assessment.

In this context, Travel Montana decided to conduct conversion research relative to its most recent magazine campaign. *Conversion research* is a traditional approach to measuring ad effectiveness. While it is difficult to determine the number of people that see advertising and subsequently travel to the area, it is easy to measure how many people respond to ads and request information. Consequently, effectiveness often is measured relative to the number of leads an ad generates. Additionally, it is critical to determine whether these responders actually visited the destination. As such, with conversion research, it is possible to quantify the impact of marketing and to learn more about visitors *and* non-visitors.

In considering the findings of this research, it is important to remember that this study measures only the impact of leisure travelers who requested information, which is a small segment of the people and groups who were influenced by the advertising. Conversion does not measure the impact of all leisure marketing efforts. Conversion identifies the number of people that responded to the marketing and the percentage that visited Montana. In addition, the specifics of their trips and spending are addressed. Specifically, this research will be designed to address the following informational objectives:

- Evaluate overall performance of the State's most recent magazine campaign which promoted Montana as a warm-weather destination. This evaluation will include an assessment of the campaign's direct return on investment;
- Assess performance of specific elements of the magazine campaign to identify the best set of target publications for future efforts;
- Consider geo-tourists as a target segment and review their performance, preferences and behavior in the context of the prior campaign;
- Explore the growth of non-destination travel in the non-VFR markets to determine the extent to which the State is being visited as part of a region and determine whether this is a serious trend or a function of ambiguous reporting;
- Profile first-time visitors to assist in generating additional visitation and, ultimately, visitor dollars to the State;
- Analyze the conversion of Travel Montana's Montanakids.com website, as well as examining visitor details from this group.
- Determine which communication message strategies resonated most with inquirers, visitors and special segments such as geo-tourists and first-time visitors; and

- Provide specific conclusions and recommendations relative to the State's assessed marketing endeavors.

To meet these informational objectives, conversion research began in February 2008 and continued into April 2008. In total, 1,123 surveys were completed, which included 321 via the Internet and 802 via telephone. Overall, 13 lead sources were tracked – *AARP The Magazine*, *Better Homes & Gardens*, *Bridal Guide*, *Budget Travel*, *Good Housekeeping*, *Madden Newspaper Insert*, *Midwest Vacation Guide*, *National Geographic Traveler*, *Readers Digest*, *Smithsonian*, *Treasure Chest Vacationers*, *Woman's Day*, and Other Sources (publications with less than 1,000 leads each). Additionally, leads were tracked from the Travel Montana Montanakids.com website; this effort resulted in 428 completed surveys: 200 from the 2006 leads and 228 from the 2007 leads. In total, from all sources, 65,438 leads were tracked and 1,551 surveys were completed.

| Sources | Leads | Surveys Completed |
|---|---------------|-------------------|
| <i>AARP The Magazine</i> | 5,329 | 97 |
| <i>Better Homes & Gardens</i> | 1,923 | 27 |
| <i>Bridal Guide</i> | 5,045 | 78 |
| <i>Budget Travel</i> | 1,116 | 40 |
| <i>Good Housekeeping</i> | 2,085 | 40 |
| <i>Madden Newspaper Insert</i> | 5,805 | 103 |
| <i>Midwest Vacation Guide</i> | 2,151 | 31 |
| <i>National Geographic Traveler</i> | 3,120 | 85 |
| <i>Readers Digest</i> | 4,010 | 96 |
| <i>Smithsonian</i> | 1,528 | 40 |
| <i>Treasure Chest Vacationers</i> | 1,775 | 65 |
| <i>Woman's Day</i> | 1,341 | 40 |
| Other Sources | 22,397 | 381 |
| Total | 57,625 | 1,123 |
| Travel Montana Montanakids.com Website 2007 | 4,455 | 228 |
| Travel Montana Montanakids.com Website 2006 | 3,358 | 200 |
| All Sources Total | 65,438 | 1,551 |

Upon completion of the data collection process, the data were cleaned, coded, weighted to be representative of all lead sources, and analyzed in accordance with industry standards. This report summarizes the key research findings and includes economic impact information. A copy of the final questionnaire appears in the Appendix to this report.

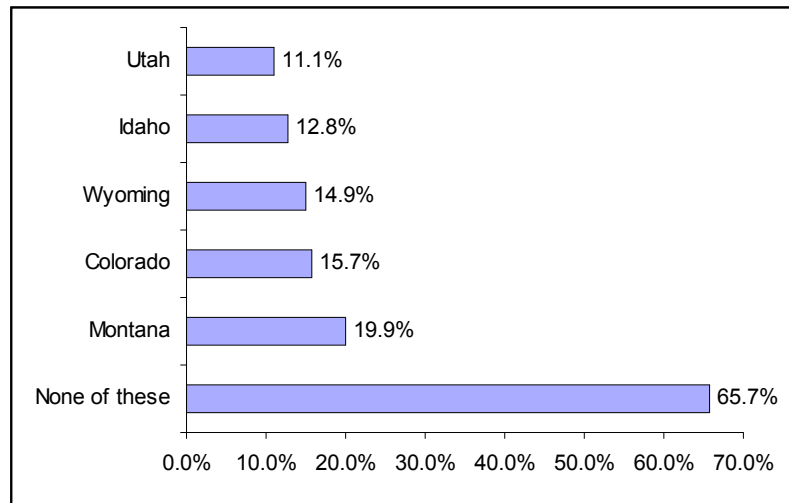
Image & Promotion

Advertising must work in a competitive environment. Generally, when people travel, they form opinions and images of destinations and what these destinations offer. While advertising can alter consumers' attitudes, it can be quite difficult to change their perceptions. Moreover, issues like distance can influence consumers' travel preferences. In this context, it is important to identify people's travel selections and preferences.

To gain insight into the competitive situation, all respondents were asked to indicate the states/destinations they had visited in 2007. Notably, 83% of respondents sampled reported taking vacations 200 or more miles away from their homes in the past year. Positively, as all respondents requested information from Travel Montana, more respondents reported visiting Montana in 2007 than any other state tested. Still, nearly 66% of respondents didn't visit any of the tested Western states. This suggests that many people are gathering information, but not traveling to this area. Given that many express interest in future travel, it may be that the planning process is longer. The challenge seems to be getting people to visit the west, rather than competing with other Western destinations.

States Traveled to & through in 2007

Although only about 33% of respondents visited one of the states tested above, nearly 83% reported taking a trip 200 or more miles away from their home within the past year. The most popular destinations were Florida, out of country stops, and California. These findings suggest that respondents who are willing to travel west to Montana also may have other far away destinations in mind.



The challenge will be convincing these travelers who visit destinations far from home to choose Montana over other popular locales. With the rising costs of traveling out of country due to the weakening dollar and high gas prices, Montana may be in a better position to attract these travelers than in the past.

Destinations 200+ Miles Away from Home Visited Within the Past Year

| | |
|----------------|-------|
| FL | 16.0% |
| Out of country | 15.3% |
| CA | 11.2% |
| NY | 8.0% |
| AZ | 7.9% |
| NV | 7.8% |

| | |
|----|------|
| TN | 7.5% |
| CO | 7.2% |
| WA | 7.1% |
| MN | 6.1% |
| NC | 5.9% |
| MO | 5.9% |
| IL | 5.4% |
| VA | 5.1% |

In developing advertising to convince people to visit, it is critical to consider consumers' perceptions of various destinations. To explore consumers' perceptions of Montana, respondents were asked to rate 19 attributes, which provided a detailed assessment of the perceived strong and weak points of each state. The ratings were based on a 5-point scale. As such, the goal was at least a rating of 4.0, with 3.5 or higher being *acceptable*. Any score lower than this indicated neutrality or negative perceptions. Ratings below 3.0 indicated negative perceptions.

Overall, Montana was rated in the excellent range on fifteen attributes, with the highest ratings for *is full of wide open spaces* and *is beautiful and scenic*. The state's lowest rated attribute related to arts and culture, but positively, even this rating was in the "good" range of 3.5 or better.

Image Ratings—Overall

| | |
|--|-----|
| Is full of wide open spaces | 4.6 |
| Is beautiful and scenic | 4.6 |
| Is peaceful | 4.4 |
| Is full of places to discover | 4.3 |
| Is adventurous | 4.3 |
| Is relaxing | 4.3 |
| Has Western hospitality and friendliness | 4.2 |
| Is refreshing | 4.2 |
| Is welcoming | 4.1 |
| Is unique | 4.1 |
| Is fun | 4.1 |
| Is rejuvenating | 4.0 |
| Is charming | 4.0 |
| Is exciting | 4.0 |
| Is engaging | 3.9 |
| Is entertaining | 3.8 |
| Is simplistic | 3.8 |
| Is action-packed | 3.6 |
| Has arts and culture | 3.5 |

To gain a better understanding of the impact of image on visitation, this research performed a two-step analysis that first grouped the image attributes by theme and then determined which themes were most critical to generating visitation. Four themes were identified using factor analysis, a process which identifies highly correlated attributes and groups them together. The four themes included the following:

Exciting & Fun:

- Is exciting
- Is action packed
- Is fun
- Is entertaining
- Is adventurous
- Is full of places to discover
- Is engaging
- Is unique

Simple & Refreshing, ctd.:

- Is relaxing
- Is refreshing

Western & Wide Open:

- Is full of wide open spaces
- Is beautiful & scenic
- Has Western hospitality and friendliness

Simple & Refreshing:

- Is simplistic
- Is peaceful
- Is rejuvenating

Artsy & Charming:

- Has arts & culture
- Is welcoming
- Is charming

After identifying these themes, the next step of the process was explaining how they correlated with likelihood to visit Montana. The correlation analysis indicates that Exciting & Fun was the strongest predictor of visitation, followed by Artsy & Charming, and then the Western & Wide Open. Simple & Refreshing was not a significant predictor of visitation to Montana.

Drivers of Visitation

Montana's top rated attributes currently fall in the Western & Wide Open theme, while many of the lowest rated attributes fall in the Artsy & Charming and Exciting & Fun theme. Creating advertising that shows Montana as both Western & Wide open – and fun with many things to do may help the state boost visitation.

| | |
|---------------------|-------|
| Exciting & Fun | 24.9% |
| Western & Wide Open | 7.8% |
| Simple & Refreshing | 2.5% |
| Artsy & Charming | 9.7% |

Travel Montana also tested three positioning statements in this research. The statements were rated on a scale from one to five, with a higher rating signaling more agreement with the statement. Ratings of 3.5 or higher show agreement, while those attributes above 4.0 indicate strong agreement. Positively, respondents strongly agreed with the statement related to Montana having *vibrant and charming small towns that serve as gateways to natural wonders*. Respondents also were in agreement with the two remaining positioning statements, but to a lesser extent.

State Positioning

| | |
|---|-----|
| Has vibrant and charming small towns that serve as gateways to natural wonders | 4.2 |
| Has Montanans who are passionate about their state and eager to guide visitors to unique four-season experiences that match each visitors interests | 3.8 |
| Has more spectacular unspoiled nature than anywhere else in the lower 48 | 3.8 |

Ultimately, Travel Montana aims to generate travel through its marketing and promotion of the state. In order to determine which positioning statement was the strongest predictor of future travel, the attributes were regressed on likelihood to visit Montana within the next two years to determine which position had the most impact on travel. The findings suggest that all three positioning techniques are positive, significant predictors of travel. However, presenting the state as a place that has *vibrant and charming small towns that serve as gateways to natural wonders* was the best strategy for driving travel. The table below shows how these three positions correlate with travel.

Drivers of Visitation

| | |
|----------------------|-------|
| Vibrant Small Towns | 20.6% |
| Passionate Montanans | 16.4% |
| Unspoiled Nature | 14.9% |

Impact of the Advertising

Travel Montana used a variety of media sources in addition to the online Montanakids.com effort in order to attract travelers to the state through advertising. One measure of the effectiveness of these advertising efforts is analyzing the percentage of respondents who recall ads from any given source. All respondents were asked if they recalled any advertising or promotions. More than one-third of warm season consumer advertising respondents recalled magazine ads, and nearly 17% recalled a magazine article. Internet ads, mailings, search engine links, other site links, and newspaper articles were recalled by far fewer respondents. Among the Montanakids.com respondents, the highest percentage of respondents recalled viewing a magazine advertisement, a link to the Montanakids.com website on another internet site, or an internet advertisement.

Recall of Advertising or Promotions

| | WS Leads | MTkids.com |
|-------------------------------|----------|------------|
| Magazine advertisement | 36.3% | 15% |
| Magazine article | 16.8% | 9% |
| Internet advertisement | 7.8% | 14% |
| Mailing received at home | 5.7% | 4% |
| Search engine link | 5.6% | 5% |
| Link on another internet site | 4.5% | 14% |
| Newspaper article | 4.2% | 3% |
| Other, (Please specify) | 7.5% | 10% |
| No, none | 37.1% | 46% |

As was previously mentioned, all respondents included in this study contacted Travel Montana and requested information about visiting the state. Interestingly, only 56% of the warm season consumer advertising respondents actually recall requesting information. Of those who remember requesting information, the highest percentage cited interest in future travel as the reason they wanted more information. Others wanted the information in order to decide if they should visit, and some were already planning a trip.

In addition to visiting the Montanakids.com site, 41% of respondents also requested information from the state. Travel Montana's Montanakids.com visitors were prompted to request information about the state to help them decide whether to visit, or because they were already thinking about taking a trip to the state.

What prompted you to request information from the state?

| | WS Leads | MTkids.com |
|---|----------|------------|
| I was thinking about taking a trip to Montana | 43.8% | 39% |
| I wanted to get more information about the state to decide whether to visit | 29.1% | 43% |
| I was already planning a trip | 23.1% | 15% |
| Other | 10.6% | 13% |

Respondents were asked to report the impact the information had on their decision to travel. About 17% of warm season consumer advertising respondents said that the information had a great deal of influence on their decision to travel, and another 38% said it had some influence. In other words, more than half of the respondents said that the information influenced their decision to travel. Further, the Montanakids.com respondents reported that the information had a great deal of influence on the decision to travel for about 19% of trips, and some influence on about 35% of trips. The remaining 46% of visitors did not think that the information was very influential.

How much did the information have on your decision to travel?

| | WS Leads | MTkids.com |
|---------------------------|----------|------------|
| A great deal of influence | 16.8% | 19.2% |
| Some influence | 38.0% | 34.6% |
| Very little influence | 20.9% | 30.8% |
| No influence at all | 24.3% | 15.4% |

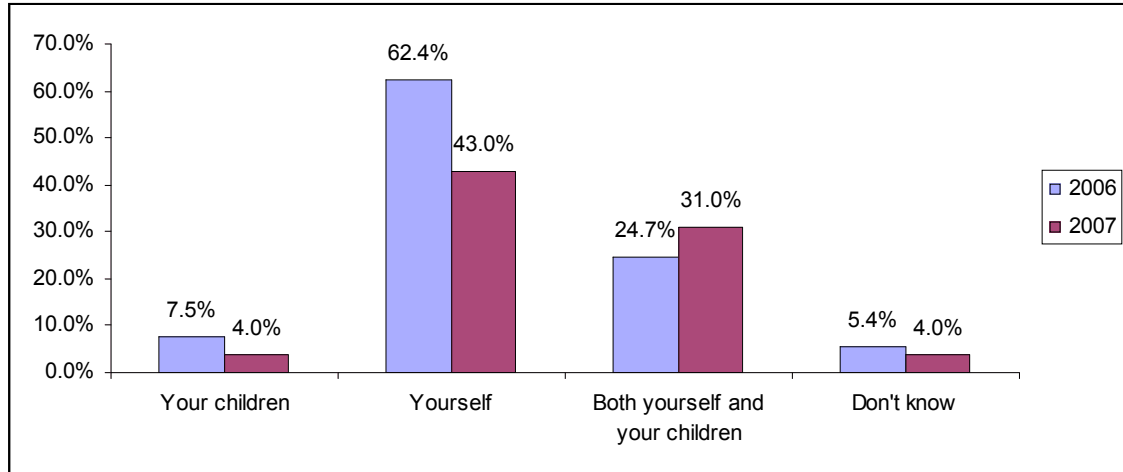
However, the travel information has less influence on the time spent in Montana – only 29% of the warm season consumer advertising sample felt that the travel information extended their travel. Also, this was the case among the Montanakids.com respondents. In fact, only about 27% said that the information lengthened their stay while 4% said it shortened their trips. In short, it appears that the travel information has greater impact on the decision to travel than it does regarding trip length.

Did the travel information influence how long you stayed in Montana?

| | WS Leads | MTkids.com |
|----------------------------------|----------|------------|
| Yes - Lengthened stay in Montana | 29.2% | 26.9% |
| Yes - Shortened stay in Montana | 0.5% | 3.8% |
| No - No effect on length of stay | 70.3% | 69.2% |

All Montanakids.com respondents were asked about their visit to the website. Notably, only 47% of 2006 leads and 36% of 2007 leads remembered visiting Montanakids.com. In 2006, the campaign was targeted to kids, while in 2007 the effort was targeted to mothers. This is evident when we review who visited the website. Specifically, in 2006 the children were more likely to have visited the website by themselves. While in 2007, the household adult was more likely to say they visited the site with their children.

Who Visited the Website?



All respondents who recalled visiting the Montanakids.com site also were asked to rate the website on a scale from 1 to 5, with a higher score indicating a more positive feeling. Generally, on scales like these, a score of 4.0 or higher indicates excellence. Positively, the Montanakids.com website was rated highly for all tested attributes. The highest rating was for providing useful information, followed by increasing interest in visiting the state. These ratings suggest that the Montanakids.com website currently is quite effective.

Website Ratings

| | |
|--|-----|
| Providing useful information | 4.3 |
| Increasing your interest in visiting the state | 4.2 |
| Being enjoyable for kids | 4.1 |
| Being enjoyable for adults | 4.1 |

Conversion Overview

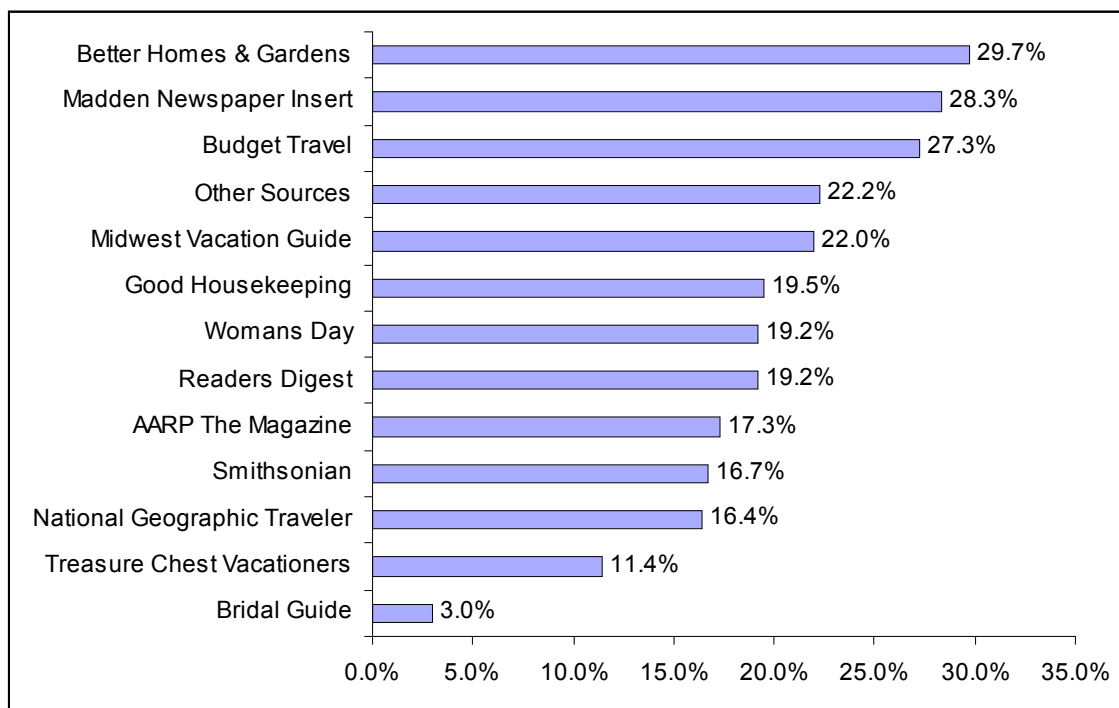
While it is interesting to explore reactions to the state, and Travel Montana's materials, ultimately Travel Montana wants to increase visitation and visitor spending in the area through its marketing efforts. The goal is to spend media dollars to have the most impact. Conversion research helps identify the publications that are the most effective. Specifically, conversion research determines the percentage of people that requested information and then actually visited Montana.

Overall, in 2007, the percentage of *converted* travelers from the warm season consumer advertising audience was nearly 20%. For the 2006 Montanakids.com effort, a conversion rate of 5.5% was noted, while 15.4% converted from 2007. SMARI has experience with a wide range of destinations. While conversion rates for destinations that attract mostly short getaways are higher, conversion rates for destinations that attract longer trips – such as Montana – have been recorded as low as 12% and as high as 33% in the past, with most being in the range of 20%-25%. According to these findings, Montana currently is on the low side of average. It is interesting to note that about 28% of those who visited the state from the warm season consumer advertising leads and Montanakids.com samples identified as first-time visitors, while the remainder said that they had visited Montana in the past.

| Overall Conversion | |
|--------------------|-------|
| WS Leads | 19.9% |
| MTkids.com 2006 | 5.5% |
| MTkids.com 2007 | 15.4% |

When considered by lead source, *Better Homes & Gardens*, the Madden Newspaper Insert, and *Budget Travel* had the highest rates of conversion with more than one-quarter of these information seekers actually taking a trip to the state. On the other hand, the *Treasure Chest Vacationers* and *Bridal Guide* had the lowest rates of conversion.

Conversion by Lead Source

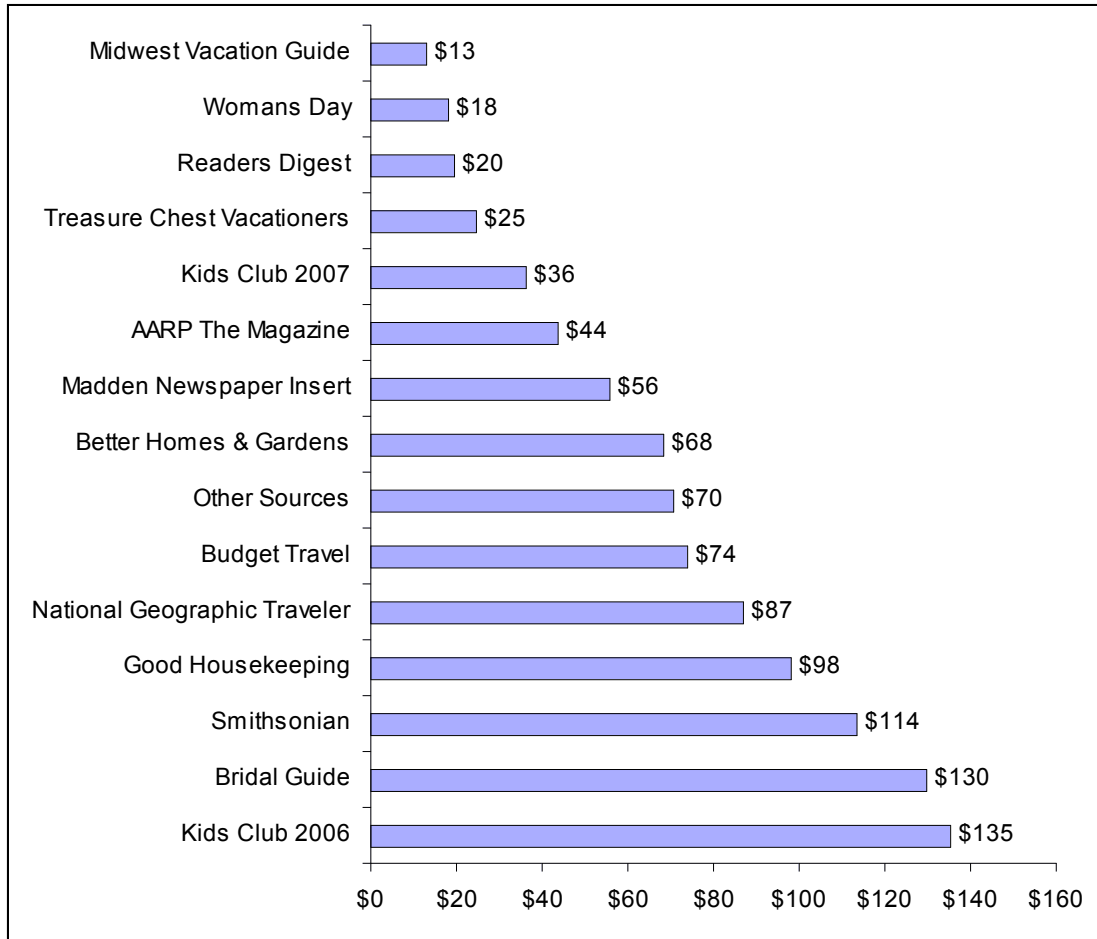


But in addition to conversion, it is also important to consider the number of leads and trips generated by media. Some publications are strong lead generators, but don't convert well, while others balance these two functions.

| Lead Source | Leads | X Conversion Rate | Converted Trips |
|------------------------------|---------------|-------------------------|--------------------|
| AARP The Magazine | 5,329 | 17.3% | 922 |
| Better Homes & Gardens | 1,923 | 29.7% | 572 |
| Bridal Guide | 5,045 | 3.0% | 153 |
| Budget Travel | 1,116 | 27.3% | 304 |
| Good Housekeeping | 2,085 | 19.5% | 407 |
| Madden Newspaper Insert | 5,805 | 28.3% | 1,644 |
| Midwest Vacation Guide | 2,151 | 22.0% | 472 |
| National Geographic Traveler | 3,120 | 16.4% | 511 |
| Readers Digest | 4,010 | 19.2% | 771 |
| Smithsonian | 1,528 | 16.7% | 255 |
| Treasure Chest Vacationers | 1,775 | 11.4% | 203 |
| Woman's Day | 1,341 | 19.2% | 258 |
| Other Sources | 22,397 | 22.2% | 4,983 |
| MTkids.com 2006 | 3,358 | 5.5% | 185 |
| MTkids.com 2007 | 4,455 | 15.4% | 686 |
| Total | 65,438 | | 12,326 |

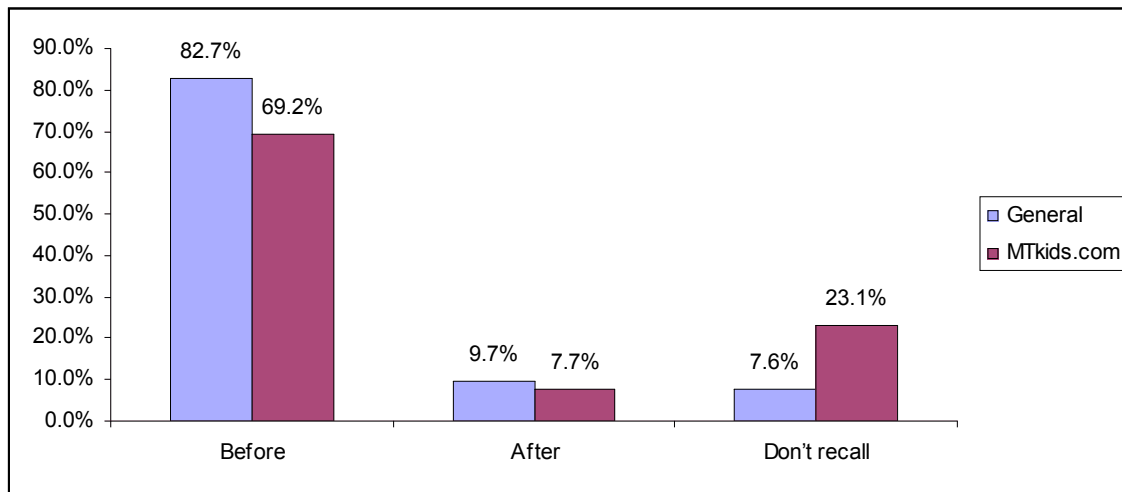
Using the information regarding conversion by lead source and the actual number of trips generated, we can determine the cost per generated visit. As shown below, while Better Homes & Gardens produced the highest rate of conversion, the cost per visit was still moderately high at \$68. Midwest Vacation Guide, Woman's Day, and Readers Digest actually produced the most trips at the lowest cost.

Cost Per Trip



All surveyed respondents requested information from Travel Montana. One way to measure effectiveness is to determine the percentage of respondents that were not already planning to visit the area when they requested information from Travel Montana (net conversion rate). Since only a fraction of leads **actually traveled** to Montana after receiving the travel materials, trips that were not already being planned before information was requested can be directly linked to the ads. Among warm season lead visitors, a majority was already planning to travel when they requested information, while only 9.7% of trips can be directly attributed to the advertising. This figure will come into play when computing the net conversion associated with the campaign. Relative to the net conversion associated with the Montanakids.com effort, 7.7% of those who converted said that they decided to visit Montana after they requested information.

Decided to Visit Montana Before or After Requesting Information—Visitors



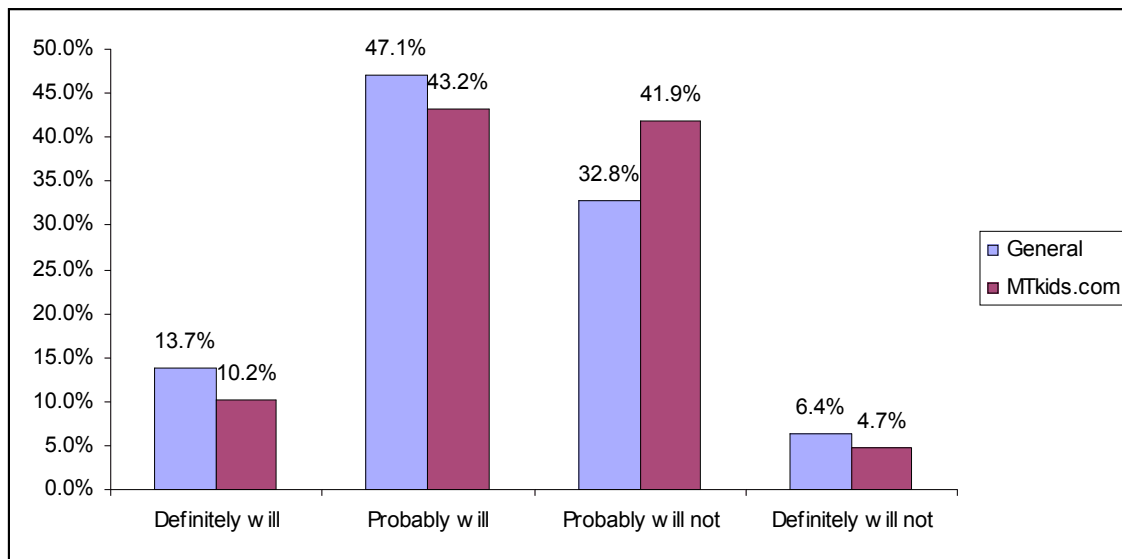
Of those from the general sample who did not visit Montana after requesting information, many decided on another destination for a trip (37%). Others said they did not have time for a trip, could not afford to vacation, or preferred a closer location. Of those Montanakids.com site visitors who did not convert, or in other words, were non-visitors, 35.9% visited a location other than Montana, about 20% could not afford the trip, and 15% said that they did not have time for a trip. Others mentioned the cost of air travel.

Reason Chose not to Visit

| | WS Leads | MTkids.com |
|--|----------|------------|
| Visited another location instead of Montana | 36.8% | 35.9% |
| No time for a trip | 19.6% | 14.9% |
| Could not afford a trip/ other financial reasons | 13.3% | 19.6% |
| Prefer a location that's closer to home | 10.1% | 8.9% |
| Personal or family illness/ problem | 8.8% | 5.5% |
| Cost of air travel too expensive | 6.3% | 10.2% |
| Did not receive information about Montana | 1.9% | 4.2% |
| Montana not attractive or interesting | 1.9% | 2.9% |
| Other reason | 21.8% | 17.5% |

Positively, more than half of non-visitors from both samples expressed interest in visiting Montana within the next two years. Specifically, nearly 14% of warm season visitors and 10% of Montanakids.com visitors said they would definitely visit within the next two years. Further, another 47% of the warm season sample and 43% of the Montanakids.com sample said they would probably visit. This suggests that even while the advertising and information materials did not convert these travelers into 2007 Montana visitors, there may be residual effects of this ad campaign in the following years.

Non-Visitors Likelihood to Visit Montana in the next two years



Visitor & Lead Profile

It's also useful to understand who is responding and who is visiting. Traveler leads were separated into two groups, visitors and non-visitors. Visitors were those that visited Montana, while non-visitors included all others surveyed. There were few demographic differences between visitors and non-visitors, perhaps because all of those surveyed expressed interest in the state before being included in the sample. The slight differences below can be used to target media.

- Visitors were more likely to be married and less likely to be single, never married than non-visitors.
- Further, visitors were slightly older on average, and earned higher incomes.

| Marital status | Non-Visitors | Visitors |
|--|---------------------|-----------------|
| Married | 71.3% | 78.1% |
| Divorced | 7.7% | 6.7% |
| Widowed | 6.0% | 5.9% |
| Single/never married | 15.0% | 9.3% |
| # currently living in household | 2.5 | 2.3 |
| # of children under the age of 18 living in household | 0.5 | 0.3 |
| Education level | | |
| High school or less | 15.0% | 13.6% |
| Some college/technical school | 27.6% | 28.3% |
| College graduate | 34.0% | 34.4% |
| Post graduate degree | 23.4% | 23.7% |
| Income | | |
| Less than \$50,000 | 30.1% | 23.4% |
| \$50,000 - \$74,999 | 27.9% | 31.9% |
| \$75,000 - \$99,999 | 20.0% | 19.1% |
| \$100,000 - \$149,999 | 13.3% | 15.9% |
| \$150,000 - \$199,999 | 5.5% | 6.4% |
| \$200,000 or more | 3.2% | 3.3% |
| Avg. Income | \$78,856 | \$83,236 |
| Age | 56 | 57 |
| Gender | | |
| Male | 43.1% | 48.3% |
| Female | 56.9% | 51.7% |

While few differences are noted between the groups, some are significant. Differences can be used to target different demographic groups. A review of the demographic profile by lead source appears below. First we review the top performing publications as determined by conversion rates: Better Homes & Gardens, the Madden Newspaper Insert, Budget Travel and Other Sources. These sources produced conversion rates between 22% and 30%:

- Better Homes & Gardens leads were the most likely to be college graduates and were also primarily women.
- Budget Travel leads were the most likely to have post-graduate degrees.

| Marital status | Better Homes & Gardens | Madden Insert | Budget Travel | Other Sources |
|--|---|--------------------------|--------------------------|--------------------------|
| Married | 76.9% | 81.4% | 82.5% | 69.2% |
| Divorced | 0.0% | 10.8% | 7.5% | 8.0% |
| Widowed | 7.7% | 2.9% | 2.5% | 7.2% |
| Single/never married | 15.4% | 4.9% | 7.5% | 15.6% |
| # currently living in household | 3.3 | 2.4 | 2.4 | 2.6 |
| # of children under the age of 18 living in household | 0.2 | 0.4 | 0.2 | 0.5 |
| Education level | | | | |
| High school or less | 3.7% | 12.6% | 7.5% | 10.8% |
| Some college/technical school | 51.9% | 35.0% | 35.0% | 24.1% |
| College graduate | 40.7% | 31.1% | 20.0% | 39.4% |
| Post graduate degree | 3.7% | 21.3% | 37.5% | 25.7% |
| Income | | | | |
| Less than \$50,000 | 26.3% | 21.7% | 20.7% | 24.4% |
| \$50,000 - \$74,999 | 21.1% | 26.5% | 20.7% | 30.8% |
| \$75,000 - \$99,999 | 21.1% | 31.3% | 24.1% | 19.6% |
| \$100,000 - \$149,999 | 21.1% | 16.9% | 10.3% | 15.1% |
| \$150,000 - \$199,999 | 10.4% | 2.4% | 20.7% | 6.6% |
| \$200,000 or more | 0.0% | 1.2% | 3.5% | 3.5% |
| Avg. Income | \$85,526 | \$79,578 | \$98,190 | \$83,405 |
| Age | | | | |
| Gender | | | | |
| Male | 22.2% | 34.0% | 45.0% | 48.8% |
| Female | 77.8% | 66.0% | 55.0% | 51.2% |

The next set of publications produced a conversion rate between 19 and 22%: Midwest Vacation Guide, Good Housekeeping, Woman's Day, and Readers' Digest.

- Midwest Vacation Guide leads were the most likely to be divorced and report high school educations or less.
- Good Housekeeping leads were the most likely to be married.
- Readers' Digest leads were the oldest, with an average age of 65.

| Marital status | Midwest Vacation Guide | Good House- keeping | Woman's Day | Readers Digest |
|--|---------------------------------------|------------------------------------|------------------------|---------------------------|
| Married | 74.2% | 87.2% | 82.5% | 75.0% |
| Divorced | 12.9% | 5.1% | 0.0% | 9.4% |
| Widowed | 3.2% | 2.6% | 7.5% | 7.3% |
| Single/never married | 9.7% | 5.1% | 10.0% | 8.3% |
| # currently living in household | 2.5 | 2.2 | 2.2 | 2.0 |
| # of children under the age of 18 living in household | 0.7 | 0.1 | 0.2 | 0.1 |
| Education level | | | | |
| High school or less | 32.3% | 28.2% | 28.9% | 20.8% |
| Some college/technical school | 35.4% | 25.7% | 21.1% | 28.1% |
| College graduate | 12.9% | 28.2% | 31.6% | 33.3% |
| Post graduate degree | 19.4% | 17.9% | 18.4% | 17.8% |
| Income | | | | |
| Less than \$50,000 | 21.4% | 25.8% | 46.2% | 48.7% |
| \$50,000 - \$74,999 | 42.9% | 22.6% | 26.9% | 23.1% |
| \$75,000 - \$99,999 | 10.7% | 19.4% | 15.4% | 14.1% |
| \$100,000 - \$149,999 | 14.3% | 29.0% | 7.7% | 7.7% |
| \$150,000 - \$199,999 | 0.0% | 3.2% | 3.8% | 5.1% |
| \$200,000 or more | 10.7% | 0.0% | 0.0% | 1.3% |
| Avg. Income | \$85,625 | \$82,016 | \$62,788 | \$65,288 |
| Age | 56 | 61 | 60 | 65 |
| Gender | | | | |
| Male | 35.5% | 30.8% | 22.5% | 41.7% |
| Female | 64.5% | 69.2% | 77.5% | 58.3% |

The remaining publications produced between 3 and 17% conversion rates: AARP The Magazine, Smithsonian, National Geographic Traveler, Treasure Chest Vacationers, and Bridal Guide.

- AARP The Magazine included more men than any other publication.
- A majority of National Geographic Traveler leads had college or post graduate educations.
- Treasure Chest Vacationer leads reported the highest average incomes, at \$109,000.
- Bridal Guide leads were the least likely to be married, most likely to be single/never married, reported the lowest incomes, and were the youngest of all publications.

| Marital status | AARP The Magazine | Smithsonian | National Geographic Traveler | Treasure Chest Vacationers | Bridal Guide |
|--|--------------------------|--------------------|-------------------------------------|-----------------------------------|---------------------|
| Married | 79.4% | 86.8% | 70.6% | 70.8% | 53.8% |
| Divorced | 6.2% | 2.6% | 8.2% | 10.8% | 5.1% |
| Widowed | 5.2% | 2.7% | 7.1% | 9.2% | 5.2% |
| Single/never married | 9.2% | 7.9% | 14.1% | 9.2% | 35.9% |
| # currently living in household | 2.1 | 2.2 | 2.1 | 2.3 | 3.1 |
| # of children under the age of 18 living in household | 0.2 | 0.1 | 0.2 | 0.4 | 1.0 |
| Education level | | | | | |
| High school or less | 17.7% | 23.1% | 11.9% | 1.5% | 19.2% |
| Some college/technical school | 26.0% | 30.8% | 16.7% | 21.5% | 33.3% |
| College graduate | 31.3% | 25.6% | 36.9% | 33.9% | 30.8% |
| Post graduate degree | 25.0% | 20.5% | 34.5% | 43.1% | 16.7% |
| Income | | | | | |
| Less than \$50,000 | 38.6% | 37.5% | 15.8% | 14.6% | 42.0% |
| \$50,000 - \$74,999 | 24.3% | 31.3% | 26.3% | 10.4% | 36.2% |
| \$75,000 - \$99,999 | 24.3% | 18.8% | 21.1% | 25.0% | 11.6% |
| \$100,000 - \$149,999 | 5.7% | 6.3% | 19.3% | 31.3% | 5.8% |
| \$150,000 - \$199,999 | 7.1% | 0.0% | 7.0% | 10.4% | 2.9% |
| \$200,000 or more | 0.0% | 6.1% | 10.5% | 8.3% | 1.5% |
| Avg. Income | \$69,571 | \$70,938 | \$100,482 | \$109,531 | \$63,080 |
| Age | 63 | 63 | 60 | 59 | 38 |
| Gender | | | | | |
| Male | 58.8% | 50.0% | 55.3% | 52.3% | 33.3% |
| Female | 41.2% | 50.0% | 44.7% | 47.7% | 66.7% |

Finally, Travel Montana Montanakids.com leads were separated into three groups, all leads, visitors and non-visitors. Visitors were those that visited Montana *after receiving* travel materials or visiting the website, while non-visitors included all others surveyed. There were few demographic differences between visitors and non-visitors. The slight differences below can be used to target media.

- Visitors were more likely to be married or divorced and less likely to be single, never married than non-visitors.
- Visitors were more likely to have completed some college/technical school and less likely to have completed high school or less.
- Further, visitors were slightly younger on average, and earned higher incomes. Since visitors earn more than \$25,000 annually than non-visitors, it appears that the main difference between the groups may be the ability to afford vacationing.

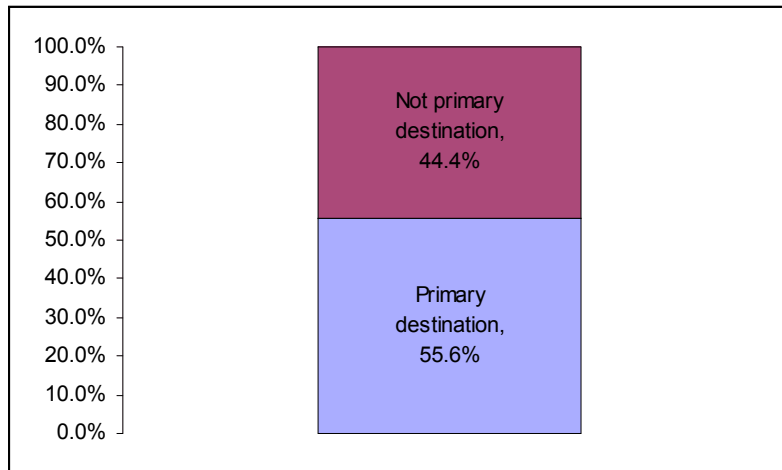
| Marital status | MTkids.com Leads | Non-Visitors | Visitors |
|--|-------------------------|---------------------|------------------|
| Married | 81.5% | 81.1% | 84.8% |
| Divorced | 7.3% | 6.8% | 10.9% |
| Widowed | 3.2% | 3.7% | 0.0% |
| Single/never married | 8.0% | 8.4% | 4.3% |
| # currently living in household | 3.4 | 3.4 | 3.4 |
| # of children under the age of 18 living in household | 1.2 | 1.2 | 1.4 |
| Education level | | | |
| High school or less | 13.0% | 13.8% | 6.5% |
| Some college/technical school | 30.4% | 29.9% | 34.8% |
| College graduate | 41.5% | 41.2% | 43.5% |
| Post graduate degree | 15.1% | 15.1% | 15.2% |
| Income | | | |
| Less than \$50,000 | 22.8% | 24.0% | 12.2% |
| \$50,000 - \$74,999 | 27.5% | 28.5% | 19.5% |
| \$75,000 - \$99,999 | 23.8% | 24.6% | 17.1% |
| \$100,000 - \$149,999 | 18.5% | 16.0% | 39.0% |
| \$150,000 - \$199,999 | 4.5% | 4.7% | 2.4% |
| \$200,000 or more | 2.9% | 2.1% | 9.8% |
| Avg. Income | \$83,558 | \$80,779 | \$106,402 |
| Age | 48 | 48 | 44 |
| Gender | | | |
| Male | 26.9% | 27.0% | 26.1% |
| Female | 73.1% | 73.0% | 73.9% |

Overall Visitor Trip Specifics—Warm Season Consumer Advertising Leads

Determining the specifics of visitors' trips provides a way to identify trends in leisure travel. All visitors were asked to provide information regarding their trips.

A pattern that was revealed in previous research is that although Montana typically is not a pass-through state, many visitors say that their trip to the state was not their primary destination. This is once again the case in this research, with about 44% of visitors saying that Montana was not their primary destination. These pass-through visitors will be explored in more detail later in this report.

Montana Primary Destination?



The average travel party consisted of 2.6 people. Just over 17% of travel parties included children, and in groups that did include children, there were 2.5 children on average. Lastly, trips were long, averaging 6.7 nights. Nationally, overnight trips last an average of 3.2 nights, again highlighting the long nature of Montana trips.

Trip Specifics

| | |
|---|-------|
| Avg. # of people 18 years and older in traveling party | 2.6 |
| % with children 17 years and younger in traveling party | 17.1% |
| Avg. # of children 17 years in parties with children | 2.5 |
| Avg. # of nights stayed in Montana | 6.7 |

Travel parties generally were characterized by families, couples and single travelers. Fewer visitors reported visiting the state with friends, organized groups and clubs, and business associations.

Travel Party

| | |
|------------------------|-------|
| Family | 40.3% |
| Couple | 33.7% |
| By yourself | 10.8% |
| Friends | 6.1% |
| Family and friends | 3.4% |
| Organized group/club | 1.8% |
| Business Association | 1.1% |
| Other (Please specify) | 2.8% |

The highest percentage of travel to Montana occurred during the summer months – June, July, and August, and also in September.

Month of Visit

| | |
|--------------|-------|
| January-07 | 1.4% |
| February-07 | 0.4% |
| March-07 | 1.5% |
| April-07 | 1.0% |
| May-07 | 6.3% |
| June-07 | 18.2% |
| July-07 | 18.8% |
| August-07 | 20.6% |
| September-07 | 16.7% |
| October-07 | 7.3% |
| November-07 | 2.0% |
| December-07 | 2.0% |
| January-08 | 0.5% |
| February-08 | 2.1% |
| March-08 | 1.2% |

Most trips were planned for two months or more, while a smaller percentage of travelers spent less time planning their vacations. For example, some visitors planned for less than one month – about 13% – and others planned between one to two months – about 20%.

Travel Planning Timeframe

| | |
|--------------------|-------|
| Less than 1 month | 12.8% |
| 1 to 2 months | 19.7% |
| 2 to 4 months | 31.0% |
| More than 4 months | 36.5% |

We can consider how the trip planning timeframe affected the average length of stay in the state. As show in the table below, those who planned their travel for four months or less stayed in Montana for about 6 nights, while those who planned their travel for four or more months, usually stayed longer, with trips lasting nearly 7 nights.

Travel Planning Timeframe by Average Nights Stayed

| | Avg. Nights |
|--------------------|-------------|
| Less than 1 month | 5.9 |
| 1 to 2 months | 5.5 |
| 2 to 4 months | 5.8 |
| More than 4 months | 6.6 |

Most respondents drove a car, van or RV into Montana, while 23% flew. Buses, trains, and other forms of transportation were used by fewer visitors.

Transportation

| | |
|-----------------|-------|
| Plane | 23.0% |
| Car, van, or RV | 71.0% |
| Bus | 1.2% |
| Train | 2.7% |
| Other - specify | 2.1% |

Hotels and motels were the primary form of accommodations used by visitors, followed by campgrounds, homes of friends and relatives, and RV parks. Very few visitors reported staying in Bed & Breakfasts.

Accommodations

| | |
|------------------------------|-------|
| Hotel or Motel | 59.7% |
| Campground | 15.6% |
| Home of friends or relatives | 14.5% |
| RV park | 11.1% |
| Bed & Breakfast | 0.6% |
| Other (Please specify) | 11.7% |

Respondents also were asked to report the activities that they chose to pursue while in the area and which of these motivated their trips. A high percentage of visitors reported sightseeing, visiting national and state parks, shopping, hiking, and visiting unique local attractions. Further, visiting national or state parks and sightseeing motivated the highest percentage of trips. Perhaps the most important finding from the table below is that there are a number of activities that are popular, but were not motivators. For example, more than half of visitors report shopping, but this activity only motivates a little over 7% of visitors. This is an important distinction since advertising should seek to show only those activities that actually motivate travel.

Activities

| | Participate | Motivate |
|---|-------------|----------|
| National or State Parks | 71.3% | 46.5% |
| Sightseeing | 76.0% | 33.2% |
| Camping | 26.0% | 13.7% |
| Wildlife viewing | 32.3% | 13.2% |
| Small towns | 58.8% | 11.7% |
| Hiking | 44.2% | 11.6% |
| Fly fishing/fishing | 16.7% | 10.3% |
| Shopping | 52.7% | 7.3% |
| Alpine skiing (downhill or cross-country) | 7.3% | 6.6% |
| A museum | 36.5% | 6.4% |
| Backpacking | 9.4% | 4.3% |
| Bird watching | 22.7% | 4.2% |
| Authentic attractions | 17.1% | 3.6% |
| Unique local restaurants | 41.5% | 3.5% |
| Hot springs | 16.1% | 2.7% |
| Fairs/festivals | 6.1% | 2.3% |
| River rafting | 6.7% | 1.7% |
| A dude ranch | 3.6% | 1.7% |
| Bicycling/mountain biking | 9.5% | 1.6% |
| Mountaineering/mountain climbing | 29.7% | 1.5% |
| Canoeing/kayaking | 6.5% | 1.1% |
| Hunting | 3.4% | 1.0% |
| A rodeo | 6.0% | 0.9% |
| Golf | 2.1% | 0.8% |
| Snowmobiling | 1.3% | 0.5% |
| Dinosaur dig | 3.0% | 0.5% |
| Horseback riding | 5.6% | 0.0% |
| Rock climbing | 2.3% | 0.0% |
| None of these | 1.0% | 6.2% |

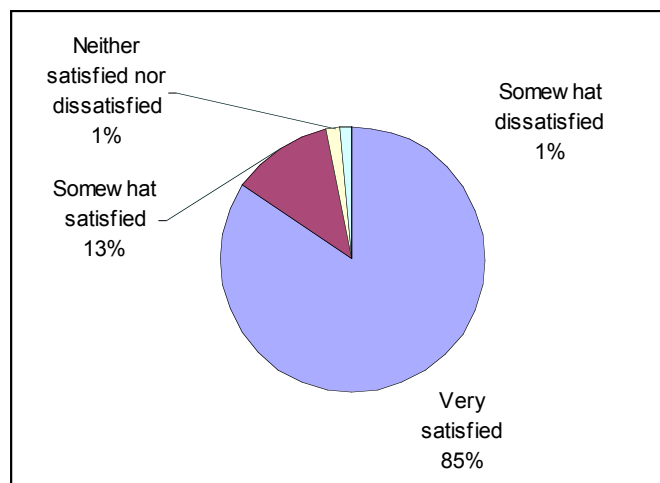
The average visitor spent nearly \$1,300 while in the state, with a majority of these expenses for lodging, meals, and transportation. Expenses for shopping also were high.

Visitor Spending

| | Spending |
|--|----------|
| Lodging | \$394 |
| Meals/food/groceries | \$278 |
| Admission/Costs at attractions & parks including rentals, lift tickets, etc. | \$71 |
| Entertainment | \$58 |
| Shopping | \$179 |
| Transportation costs in Montana such as Rental car, gasoline, taxis/shuttles, etc. | \$222 |
| Miscellaneous other things | \$73 |
| Total spending | \$1,275 |

Positively, nearly all visitors were very or somewhat satisfied with their trips to the state. This is important, as positive experiences often lead to repeat visitation.

Trip Satisfaction



Overall Visitor Trip Specifics—Montanakids.com

It is important to review the visitor trip specifics of leads generated by the Travel Montana Montanakids.com effort. As was previously discussed, Travel Montana is interested in the state being visited as a pass-through destination (as defined by Montana being part of a larger western vacation). Relative to the Montanakids.com converters, 69.6% of visitors went to the state as their main vacation destination. This is actually higher than what was reported for the warm season audience, suggesting that Montanakids.com converters are more likely to visit the state as their primary vacation destination. Other trip specifics now will be reviewed.

Generally, groups included 2.2 people, and not surprisingly, a majority of these trips included children. Further, in those groups that included children, the average number was 2.8. These trips also were long in nature, lasting nearly 9 nights.

Trip Specifics

| | |
|--|-------|
| Avg. # of people 18 years and older in traveling party | 2.2 |
| % of travel parties with children | 84.8% |
| Avg. # of children 17 years in parties with children | 2.8 |
| Avg. # of nights stayed in Montana | 8.6 |

Trips, generally, were planned in long time frames, with about 35% of trips being planned 4 or months in advance. Only 13% of trips were planned in one month or less.

Travel Planning Timeframe

| | |
|--------------------|-------|
| Less than 1 month | 13.0% |
| 1 to 2 months | 23.9% |
| 2 to 4 months | 28.3% |
| More than 4 months | 34.8% |

Montanakids.com visitors were most likely to visit the state during July, August and September.

Month of Trip

| | |
|--------|-------|
| Mar-07 | 2.4% |
| Apr-07 | 0.0% |
| May-07 | 2.4% |
| Jun-07 | 7.3% |
| Jul-07 | 29.3% |
| Aug-08 | 24.4% |
| Sep-07 | 12.2% |
| Oct-07 | 4.9% |
| Nov-07 | 0.0% |
| Dec-07 | 7.3% |
| Jan-08 | 0.0% |
| Feb-08 | 2.4% |
| Mar-08 | 7.3% |

The most popular activities among these visitors included visiting state or national parks, sightseeing, and wildlife watching. National & State parks also motivated the highest percentage of trips, followed by wildlife watching, and sightseeing. As was previously mentioned regarding trip activities among the general audience, Montanakids.com visitors participated in a variety of activities that were not motivators. The website should highlight primary motivators of travel, but also show popular activities, to help consumers visualize a trip to the state.

Trip Activities

| | Participate | Motivate |
|---|-------------|----------|
| National or State Parks | 67.4% | 44.2% |
| Wildlife viewing | 54.3% | 20.9% |
| Site seeing | 60.9% | 14.0% |
| Small towns | 47.8% | 11.6% |
| Horseback riding | 23.9% | 7.0% |
| Fly fishing/fishing | 23.9% | 7.0% |
| River rafting | 13.0% | 7.0% |
| A rodeo | 15.2% | 4.7% |
| A dude ranch | 8.7% | 4.7% |
| Hiking | 47.8% | 4.7% |
| Camping | 21.7% | 4.7% |
| Dinosaur dig | 2.2% | 2.3% |
| Alpine skiing (downhill or cross-country) | 6.5% | 2.3% |
| Hunting | 6.5% | 2.3% |
| Shopping | 43.5% | 2.3% |
| Snowmobiling | 4.3% | 2.3% |
| Unique local restaurants | 52.2% | 2.3% |
| Bird watching | 10.9% | 0.0% |
| Backpacking | 6.5% | 0.0% |
| Canoeing/kayaking | 2.2% | 0.0% |
| Fairs/festivals | 21.7% | 0.0% |
| Hot springs | 10.9% | 0.0% |
| Bicycling/mountain biking | 6.5% | 0.0% |
| Authentic attractions | 28.3% | 0.0% |
| A museum | 47.8% | 0.0% |
| Mountaineering/mountain climbing | 2.2% | 0.0% |
| Rock climbing | 4.3% | 0.0% |
| Golf | 4.3% | 0.0% |
| Other (Please specify) | 10.9% | 4.7% |
| None of these | 6.5% | 14.0% |

Most visitors arrived in the state by car, van or RV, while only about 30% flew to the state.

Transportation Used

| | |
|-----------------|-------|
| Car, van, or RV | 67.4% |
| Plane | 30.4% |
| Bus | 2.2% |

Montanakids.com visitors were most likely to stay with friends and relatives or to stay at hotels and motels. Campgrounds, RV parks, Bed & Breakfasts, and other accommodations were used less often.

Accommodations

| | |
|------------------------------|-----|
| Home of friends or relatives | 43% |
| Hotel or Motel | 41% |
| Campground | 7% |
| RV park | 4% |
| Bed & Breakfast | 2% |
| Other (Please specify) | 11% |

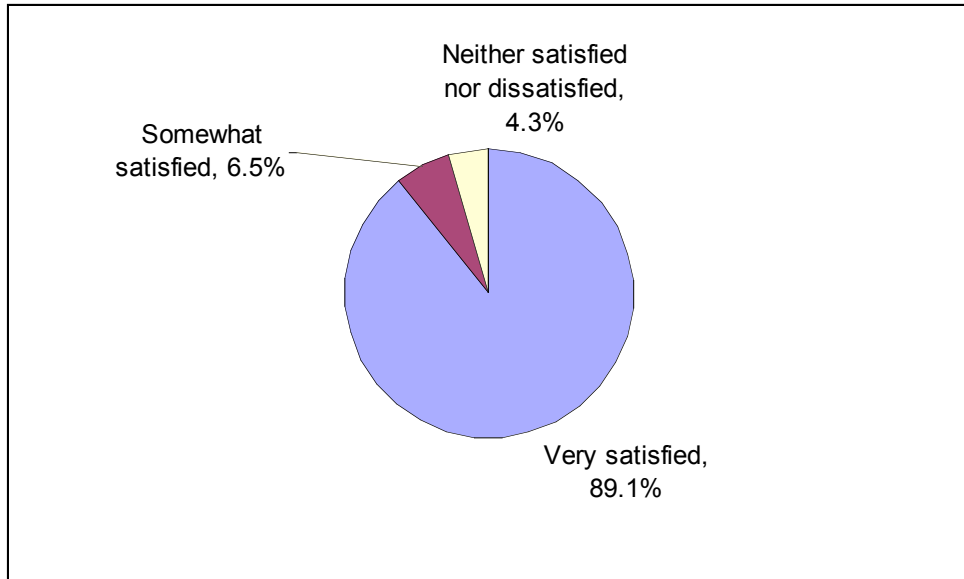
Average spending for these visitors was \$1,405, with the highest expenses for lodging, meals, and transportation. Montanakids.com visitors also spent over \$200 on shopping.

Spending

| | |
|--|---------|
| Lodging | \$347 |
| Meals/food/groceries | \$313 |
| Admission/Costs at attractions & parks including rentals, lift tickets, etc. | \$106 |
| Entertainment | \$83 |
| Shopping | \$208 |
| Transportation costs in Montana such as Rental car, gasoline, taxis/shuttles, etc. | \$271 |
| Miscellaneous other things | \$76 |
| Total | \$1,405 |

Positively, nearly 90% of visitors were very satisfied with their trips.

Trip Satisfaction



Economic Impact & ROI

This research was conducted to determine the effectiveness of Travel Montana's general ad campaign & Montanakids.com campaigns via its ROI, a figure which accounts for the investment made in the marketing and its ultimate return to the area's tourism trade. To compute total revenue, the conversion rate is applied to the number of leads to determine the number of trips generated. This number then is multiplied by the spending figures to determine the economic impact of those who requested information from Travel Montana.

In 2007, the warm season consumer advertising from Travel Montana generated an additional 11,455 trips, with average expenditures of \$1,275. The total combined revenue was \$14.6 million. Remember that this \$14.6 million was generated only by those who requested information about Montana and then converted. Since nearly 28% of those who visited were first time visitors, this means that the total Economic impact associated with first time visitation is \$4.0 million dollars.

| | Warm Season Conversion |
|-------------------|---------------------------------------|
| Leads | 57,625 |
| X Conversion Rate | 19.9% |
| = Converted Trips | 11,455 |
| X Expenditures | \$1,275 |
| =Economic Impact | \$14,608,363 |

Montanakids.com generated an additional 871 trips, with average expenditures of \$1,405. The total combined revenue was slightly over \$1.2 million. Remember that this \$1.2 million was generated only by those who requested information/visited the Montanakids.com site and then converted. Further, since 28% of visitors were first time visitors, \$342,000 can directly be attributed to first time visitation.

| | Montanakids.com | |
|-------------------|------------------------|-------------|
| | 2006 | 2007 |
| Leads | 3,358 | 4,455 |
| X Conversion Rate | 5.5% | 15.4% |
| = Converted Trips | 185 | 686 |
| X Expenditures | \$1,405 | \$1,405 |
| =Economic Impact | \$259,489 | \$963,928 |
| Total | | \$1,223,418 |

As discussed, 9.7% of visitors' trips were directly influenced by the advertising. In other words, of all the trips recorded in this research, 9.7% were not already considering Montana when they requested information. The ads first prompted these travelers to request information and, subsequently, to visit the area. This percentage, which is about average, represents the *net conversion* of the campaign. In total, 1,110 trips can be directly attributed to the advertising, generating \$1,415,062 in economic impact.

| | Overall Conversion |
|-----------------------------|---------------------------|
| Leads | 57,625 |
| X Conversion Rate | 19.9% |
| = Converted Trips | 11,455 |
| # Trips associated with ads | 1,110 |
| X Expenditures | \$1,275 |
| = Net Economic Impact | \$1,415,062 |

Among the Montanakids.com visitors, 7.7% of trips were directly influenced by the advertising. This percentage, which is lower than that of the general ad campaign, represents the *net conversion* of the campaign. In total, 67 trips can directly be attributed to the advertising, generating \$94,135 in economic impact.

| | Montanakids.com | |
|-----------------------------|------------------------|-------------|
| | 2006 | 2007 |
| Leads | 3,358 | 4,455 |
| X Conversion Rate | 5.5% | 15.4% |
| = Converted Trips | 185 | 686 |
| # Trips associated with ads | 14 | 53 |
| X Expenditures | \$1,405 | \$1,405 |
| = Net Economic Impact | \$19,670 | \$74,465 |
| Total | | \$94,135 |

A comparison of the investment made to generate these additional leads and the economic impact figure provides the total ROI. In 2007, the advertising expenditures were \$708,000 for the warm season consumer advertising campaign, making the total ROI \$21 for every \$1 invested in advertising. In 2004, the ROI was only \$17.50 for every dollar spent on advertising suggesting that this ROI is quite strong and lead conversion successfully boosted Montana's tourism trade. The net conversion from the Travel Montana's warm season consumer advertising efforts was much lower, at \$2 for every \$1 spent on advertising. Still, the evidence suggests that more trips will result from the advertising over the next year.

Further, with about \$50,000 in expenditures for the Montanakids.com website, the ROI was even stronger, with \$24 for every \$1 spent on advertising. The Net conversion from this effort was the same as for the general campaign, at \$2 for every \$1 spent on ads.

| | Warm Season Campaign Impact | Warm Season Campaign Net Conversion | MTkids.com Impact | MTkids.com Net Conversion |
|--------------------|--------------------------------------|---|----------------------|---------------------------------|
| Economic Impact | \$14,608,363 | \$1,415,062 | \$1,223,418 | \$94,135 |
| Media Expenditures | \$708,827 | \$708,827 | \$50,000 | \$50,000 |
| ROI | \$21 | \$2 | \$24 | \$2 |

Considered by lead source, The Midwest Vacation Guide produced the highest ROI, followed by Woman's Day, and Reader's Digest. The worst-performing publications included the Bridal Guide, Montanakids.com 2006, and Smithsonian. These findings can be taken into consideration in future media buys.

| Lead Source | Leads | X Conversion Rate | Converted Trips | Economic Impact | Media Costs | ROI by publication |
|----------------------------------|---------------|-------------------------|--------------------|---------------------|----------------|-----------------------|
| AARP Mag | 5,329 | 17.3% | 922 | \$1,176,225 | \$40,209 | \$29 |
| Better Homes & Gardens | 1,923 | 29.7% | 572 | \$729,081 | \$39,032 | \$19 |
| Bridal Guide | 5,045 | 3.0% | 153 | \$194,963 | \$19,862 | \$10 |
| Budget Travel | 1,116 | 27.3% | 304 | \$388,149 | \$22,513 | \$17 |
| Good Housekeeping | 2,085 | 19.5% | 407 | \$518,821 | \$39,942 | \$13 |
| Madden Newspaper | 5,805 | 28.3% | 1,644 | \$2,096,425 | \$91,481 | \$23 |
| Midwest Vac.Guide | 2,151 | 22.0% | 472 | \$602,150 | \$6,177 | \$97 |
| National Geo Traveler | 3,120 | 16.4% | 511 | \$652,274 | \$44,485 | \$15 |
| Readers Digest | 4,010 | 19.2% | 771 | \$983,437 | \$15,219 | \$65 |
| Smithsonian | 1,528 | 16.7% | 255 | \$324,771 | \$28,924 | \$11 |
| Treasure Chst. Vacationers | 1,775 | 11.4% | 203 | \$258,700 | \$5,000 | \$52 |
| Woman's Day | 1,341 | 19.2% | 258 | \$328,875 | \$4,702 | \$70 |
| Other Sources | 22,397 | 22.2% | 4,983 | \$6,354,490 | \$351,281 | \$18 |
| MTkids 2006 | 3,358 | 5.5% | 185 | \$259,410 | \$25,000 | \$10 |
| MTkids 2007 | 4,455 | 15.4% | 686 | \$963,631 | \$25,000 | \$39 |
| Total | 65,438 | | 12,326 | \$15,831,404 | | |

TARGETING & MESSAGING

Pass-Through Visitors (Warm Season Consumer Advertising Leads)

Travel Montana is interested in understanding visitors who are “passing through” the state as a part of a regional trip, as opposed to visiting the state as a main destination. Therefore, this study takes into consideration these trips in comparison to those where Montana is the main destination.

Pass-through visitors were more likely than those visiting Montana as a main destination to drive by car, van, or RV to the state. Fewer pass-through visitors flew.

Transportation

| | Montana Main Dest. | Pass-Through Visitor |
|-----------------|--------------------|----------------------|
| Car, van, or RV | 64.3% | 79.4% |
| Plane | 30.6% | 13.5% |
| Bus | 0.0% | 2.6% |
| Train | 4.0% | 1.2% |
| Other - specify | 1.1% | 3.4% |

While the average size of both groups’ travel parties was very similar, pass-through visitors were less likely to have children in their parties. Also interesting is the fact that pass-through parties that did have children in their groups had more children on average—3.2 as compared to 2.0 for those visiting the state as a main destination. Predictably, pass-through trips were about two nights shorter, with the average trip lasting 5.6 nights. Since pass-through trips were shorter, it’s not surprising that, on average, pass-through visitors participated in about two fewer activities during their stays. Specifically, where pass-through visitors participated in 5.3 activities, those visiting Montana as a main destination participated in 7.5 activities.

Trip Specifics

| | Montana Main Dest. | Pass-Through |
|--|--------------------|--------------|
| Avg. # of people 18 years and older in traveling party | 2.7 | 2.5 |
| % of travel parties with children | 18.9% | 14.8% |
| Avg. # of children 17 years in parties with children | 2.0 | 3.2 |
| Avg. # of nights stayed in Montana | 7.6 | 5.6 |
| Avg. # of activities | 7.5 | 5.3 |

Hotels and motels were the most popular accommodation, and pass-through visitors reported higher usage of these accommodations. Since pass-through visitors were more likely to drive, it's not surprising that they also were more likely to stay in an RV park. Notably, pass-through visitors were much less likely to stay with friends or family while in the state.

Accommodations

| | Montana Main Dest. | Pass- Through |
|------------------------------|--------------------------|------------------|
| Hotel or Motel | 54% | 67% |
| Bed & Breakfast | 1% | 0% |
| Campground | 17% | 14% |
| RV park | 8% | 16% |
| Home of friends or relatives | 22% | 4% |
| Other (Please specify) | 15% | 8% |

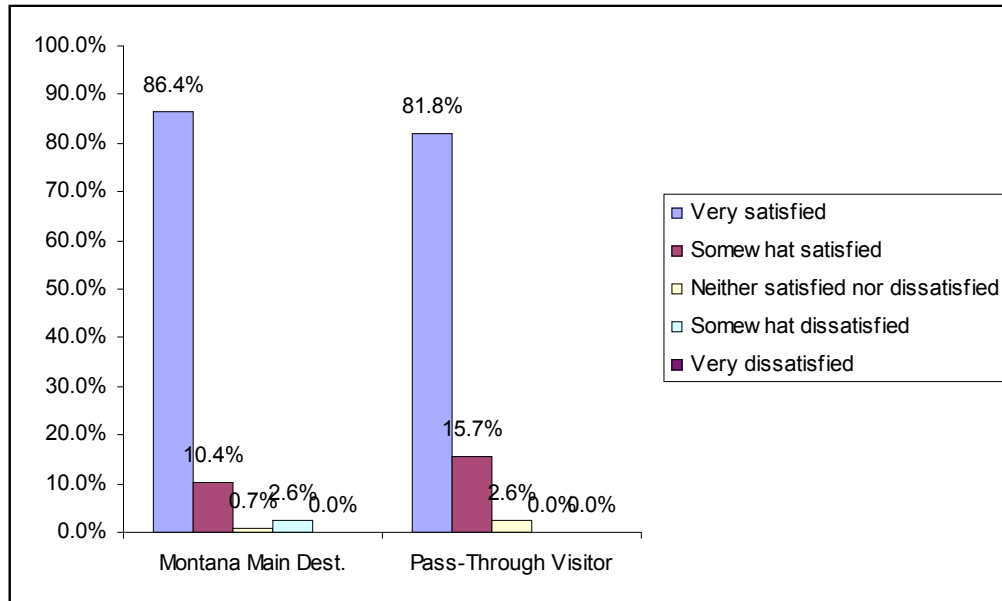
Since those visiting the state stayed longer and also participated in more activities, it's understandable that they would spend more than pass-through visitors. Pass-through visitors reported much lower spending in nearly every category. Per-person per-night spending also was higher on the part of those visiting the state as a main destination. These visitors spent \$77 per-person per-night, while pass-through visitors spent \$60.

Visitor Spending

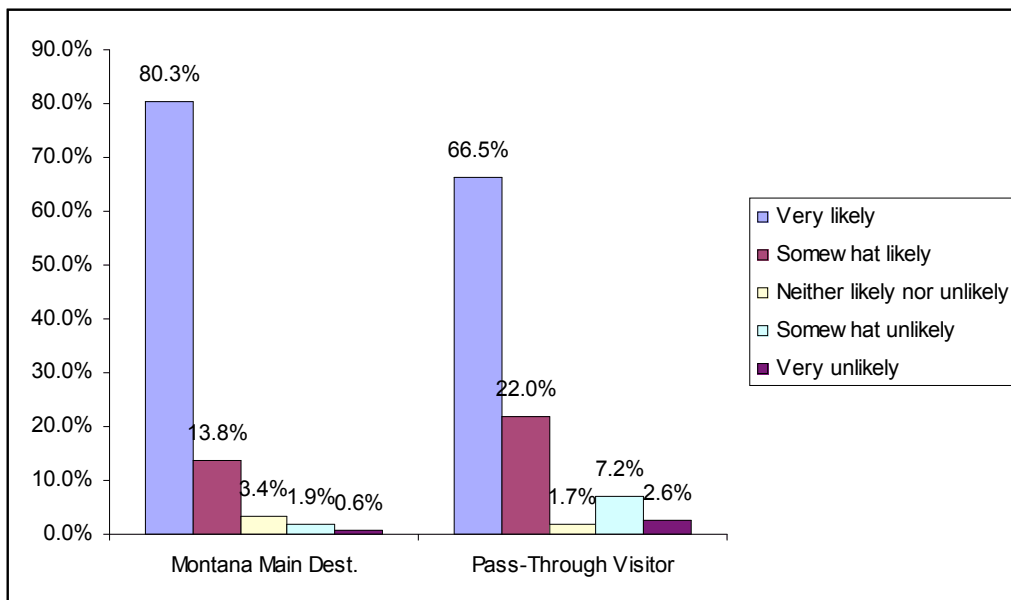
| | Montana Main Dest. | Pass- Through |
|--|--------------------------|------------------|
| Lodging | \$490 | \$270 |
| Meals/food/groceries | \$357 | \$179 |
| Admission/Costs at attractions & parks including rentals, lift tickets, etc. | \$104 | \$29 |
| Entertainment | \$75 | \$38 |
| Shopping | \$222 | \$123 |
| Transportation costs in Montana such as Rental car, gasoline, taxis/shuttles, etc. | \$274 | \$156 |
| Miscellaneous other things | \$91 | \$52 |
| Total | \$1,613 | \$848 |
| Cost per person, per night | \$77 | \$60 |

Positively, nearly all pass-through visitors were somewhat or very satisfied with their trips, and somewhat or very likely to visit again, suggesting that even though the main destination of their trip wasn't Montana, these visitors still plan on returning. This represents an opportunity for Travel Montana to promote the state as a good stop on the part of a longer, regional trip.

Trip Satisfaction







Likelihood to Visit Montana in the Next Two Years



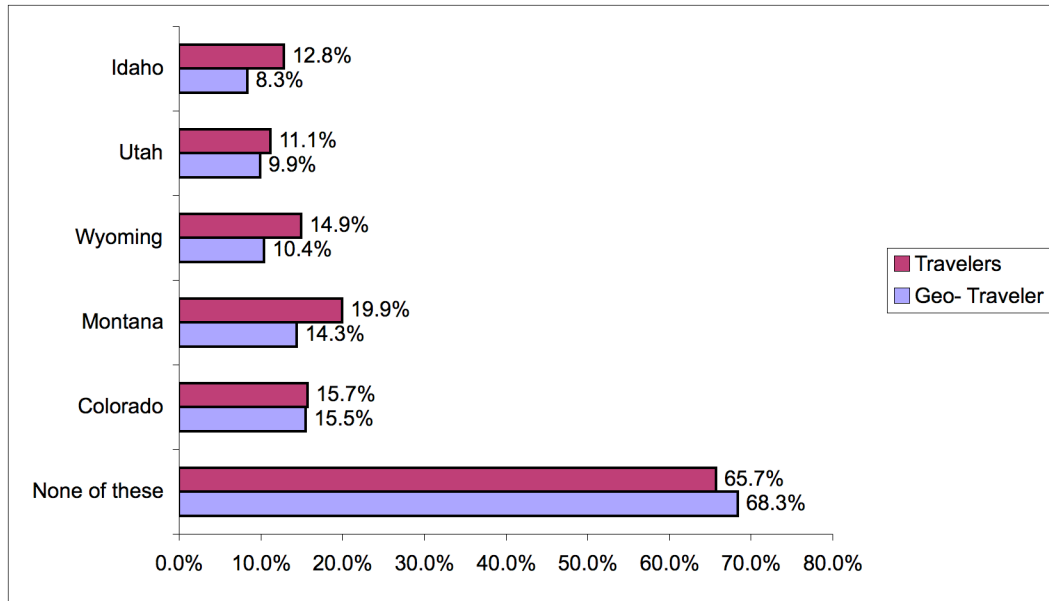
TARGETING & MESSAGING—Geo-tourists

Travel Montana is interested in understanding travel behavior by Geo-tourists, those who are interested in taking environmentally friendly vacations. This research profiled Geo-tourists with the use of Prizm. Specifically, respondents belonging to the four Prizm groups Movers & Shakers, Young Digerati, Winner's Circle, and Money & Brains are likely to take geotourism vacations, and were thus used in this research to represent Geo-tourists. A description of the four Prizm groups comprising Geo-tourists follows:

| | | | | |
|------------------|---|------------------|---------------|---|
| Movers & Shakers |  | S1 Elite Suburbs | Younger Years | Home to America's up and coming business class: a wealthy suburban world of dual-income couples who are highly educated, typically between the ages of 35 and 54, often with children. Given its high percentage of execs and white-collar professionals, there's a decided business bent to this segment: Movers & Shakers rank number one for owning a small business and having a home office. |
| Young Digerati |  | U1 Urban Uptown | Younger Years | The nation's tech-savvy singles and couples living in fashionable neighborhoods on the urban fringe. Affluent, highly educated and ethnically mixed, Young Digerati communities are typically filled with trendy apartments and condos, fitness clubs and clothing boutiques, casual restaurants and all types of bars - from juice to coffee to microbrew. |
| Winner's Circle |  | S1 Elite Suburbs | Family Life | Among the wealthy suburban lifestyles, Winner's Circle is the youngest, a collection of mostly 25 to 34 year old couples with large families in new-money subdivisions. Surrounding their homes are the signs of upscale living: recreational parks, golf courses and upscale malls. With a median income of nearly \$90,000, Winner's Circle residents are big spenders who like to travel, ski, dine out, shop at clothing boutiques, and take in a show. |
| Money & Brains |  | U1 Urban Uptown | Mature Years | These residents seem to have it all; high incomes, advanced degrees and sophisticated tastes to match their credentials. Many of these city dwellers – predominantly white with a high concentration of Asian Americans – are married couples with few children who live in fashionable homes on small, manicured lots. |

First, it is important to know travel patterns and preferences of Geo-tourists. Geo-tourists were most likely to report visiting Colorado or Montana, although a majority did not visit any of the tested states. In fact, with the exception of Colorado, Geo-tourists were less likely to visit any of these tested western states.

Geo-tourists & Warm Season Consumer Advertising Leads—Travel Destinations 2007



As compared to Montana visitors, Geo-tourists are more likely to be single/never married and less likely to be divorced or widowed. Geo-tourists also are more likely to report post-graduate educations, report higher incomes, are slightly older, and represent more men on average.

| Marital status | Geo-tourists | Visitor |
|--|---------------------|-----------------|
| Married | 76.0% | 78.1% |
| Divorced | 4.2% | 6.7% |
| Widowed | 4.7% | 5.9% |
| Single/never married | 15.1% | 9.3% |
| # currently living in household | 2.3 | 2.3 |
| # of children under the age of 18 living in household | 0.4 | 0.3 |
| Education level | | |
| High school or less | 6.5% | 13.6% |
| Some college/technical school | 22.7% | 28.3% |
| College graduate | 35.1% | 34.4% |
| Post graduate degree | 35.7% | 23.7% |
| Income | | |
| Less than \$50,000 | 12.4% | 23.4% |
| \$50,000 - \$74,999 | 20.3% | 31.9% |
| \$75,000 - \$99,999 | 29.7% | 19.1% |
| \$100,000 - \$149,999 | 22.3% | 15.9% |
| \$150,000 - \$199,999 | 9.4% | 6.4% |
| \$200,000 or more | 5.9% | 3.2% |
| Avg. Income | \$100,576 | \$83,236 |
| Age | 59 | 57 |
| Gender | | |
| Male | 55.3% | 48.3% |
| Female | 44.7% | 51.7% |

We can consider Geo-tourists' image ratings of Montana. In addition to mean scores, the table below lists an index which compares Geo-tourists' ratings to the average rating. An index score of 100 means that the rating was average; a score of 105 indicates 5% above average; and 95 indicates 5% below average. Geo-tourists rated Montana higher than average on two attributes: *having more spectacular unspoiled nature than anywhere in the lower 48*, and being *adventurous*. Many ratings, however, were lower than average, especially those for *charming* and *arts & culture*. Still, Geo-tourists rated the state highly. But, these ratings suggest that Montana will have to more readily communicate its assets to influence this target segment.

Image Ratings—Geo-tourists

| Image Ratings | Geo-tourists | Index |
|---|--------------|-------|
| Is adventurous | 4.3 | 101 |
| Is full of wide open spaces | 4.7 | 100 |
| Is beautiful and scenic | 4.6 | 100 |
| Has Western hospitality and friendliness | 4.2 | 100 |
| Is full of places to discover | 4.3 | 100 |
| Is refreshing | 4.2 | 99 |
| Is exciting | 3.9 | 99 |
| Is peaceful | 4.4 | 99 |
| Is welcoming | 4.1 | 99 |
| Is unique | 4.1 | 99 |
| Is fun | 4.0 | 98 |
| Is rejuvenating | 3.9 | 98 |
| Is relaxing | 4.2 | 98 |
| Is action-packed | 3.6 | 98 |
| Is engaging | 3.8 | 97 |
| Is simplistic | 3.6 | 97 |
| Is entertaining | 3.6 | 95 |
| Is charming | 3.8 | 95 |
| Has arts and culture | 3.3 | 94 |
| Positioning Attributes | | |
| Has more spectacular unspoiled nature than anywhere else in the lower 48 | 3.9 | 102 |
| Has Montanans who are passionate about their state and eager to guide visitors to unique four-season experiences that match each visitors interests | 3.8 | 100 |
| Has vibrant and charming small towns that serve as gateways to natural wonders | 4.2 | 100 |

In order to understand attitudinal differences between Geo-tourists and the average Montana visitor, respondents were asked how the promotion of local heritage, culture, and the preservation of the environment would impact their travel decisions. Geo-tourists and average Montana travelers felt more strongly about the promotion of efforts to preserve the environment, but also were influenced by the promotion of heritage, culture, and the environment. There were few differences between the groups.

| | Promotion of local heritage & culture and/or preservation of the environment | | Promotion of efforts to preserve the environment | |
|---------------------------|--|-------|--|-------|
| | Avg. | Geo | Avg. | Geo |
| No influence | 11.2% | 10.6% | 11.4% | 11.3% |
| Very little influence | 21.2% | 17.6% | 14.7% | 17.9% |
| Some influence | 46.8% | 51.5% | 43.9% | 42.0% |
| A great deal of influence | 20.8% | 20.3% | 29.9% | 28.8% |

Interestingly, Geo-tourists again were similar to the average Montana traveler relative to their involvement in community and local events and causes. Specifically, most respondents said they were somewhat involved in local community events and causes.

Involvement in local community events and causes

| | Avg. | Geo-tourists |
|---------------------|-------|--------------|
| Not involved at all | 8.5% | 9.6% |
| Not very involved | 21.1% | 19.6% |
| Somewhat involved | 52.7% | 52.1% |
| Very involved | 17.8% | 18.7% |

In sum, the message of preservation seems good, but applies more broadly to the potential audience. These findings suggest that Geo-tourists hold many of the same beliefs as the average Montana traveler, and are similar demographically. What may be the key difference between the groups is the higher income of the geotourist group, which likely indicates more expendable income that can be used to be choosier when it comes to traveling decisions.

Conclusions & Recommendations

In summary, this research reviewed the conversion of leads into visitors from the general audience advertising and also the Montanakids.com website. Further, the economic impact and ROI associated with these efforts was reviewed. Overall, the findings are quite positive. Converted travelers from the warm season consumer advertising accounted for \$14 million in economic impact, for a ROI of \$21 for every \$1 spent on advertising. The advertising can be directly attributed to 9.7% of these trips, as these travelers were not considering Montana for a trip before they requested information about the state. In this regard, \$1.4 million can be directly attributed to the ads. Relative to the Montanakids.com Campaign effort, nearly 900 additional trips were generated, with higher trip expenditures, creating a total impact of more than \$1.2 million for just this medium. Further, nearly 8% of these visitors were not considering Montana before visiting the website or requesting information, resulting in \$94,000 of economic impact that can directly be attributed to the ads. Overall the ROI associated with the Montanakids.com effort was even higher, at \$24 for every dollar spent on advertising, while the net conversion was the same as for the warm season consumer advertising, at \$2 for every \$1 spent on the website.

Other findings of this research also were positive.

- Although the warm season consumer advertising only converted about 20% of leads and the Montanakids.com Campaign site converted about 6% in 2006 and 15% in 2007 more than half of non-visitors are still likely to visit the state within the next two years. This suggests that the impact of the advertising will continue in the years to come.
- For both the warm season consumer advertising and the Montanakids.com effort, 28% of visitors were first-time visitors. First-time visitation, therefore, was responsible for \$4.0 million of economic impact for warm season consumer advertising visitation, and \$342,000 for Montanakids.com visitors.
- The image of Montana is quite positive, and the state is rated rather highly on most image attributes. The state was rated especially high for its natural beauty, wide open spaces, and peaceful nature.
- Travelers are most motivated to visit when they perceive a destination to be exciting & fun. Travel Montana needs to find ways to promote the state's Western & Wide Open offerings in a manner that shows the fun & exciting nature of the state.
- Relative to positioning, the strongest predictor of future travel was having *vibrant and charming small towns that serve as gateways to natural wonders*. Travel Montana can use this positioning method in future advertising campaign.
- Visitors who converted from the warm season consumer advertising spent nearly 7 nights on average, while Montanakids.com visitors spent nearly 9 nights in the state. These long trips also were associated with high spending in both groups, driving the economic impact and ROI figures.
- Nearly half (about 45%) of the general-advertising visitors were passing through the state. These trips were about two nights shorter and included fewer activities. This travel segment holds a lot of potential for Travel Montana, as a high percentage would consider visiting the state again within the next two years.

- Geo-tourists differed little relative to attitudes as compared to other travelers. What is interesting, however, is the fact that Geo Tourists generally earn higher incomes. These higher incomes may be the main difference in travel preferences, since these higher incomes likely signal more expendable income and therefore, the ability to be choosy in travel preferences.

Appendix—Questionnaire

Travel Montana Conversion Study Questionnaire Final – February 12, 2008

We are conducting a brief survey regarding travel and tourism. We would appreciate it if you could assist us in this research effort by completing this survey. No sales call will ever result from your participation and all your answers will be kept strictly confidential. The survey should take about 10 minutes to complete.

[PROGRAMMER – USE CURRECT PHONE SURVEY FOR EXAMPLE ON S1]

S1. Are you the person in that is responsible for planning trips and vacations for your household?

1...Yes

2...No [INTERVIEWER ASK TO SPEAK WITH PERSON RESPONSIBLE]

1. What states have you traveled to or through for a leisure trip during 2007?

| | Visited |
|---------------|---------|
| Colorado | |
| Idaho | |
| Montana | |
| Utah | |
| Wyoming | |
| None of these | |

IF Q1_3 = 0, SKIP TO Q4

2. Was Montana your PRIMARY vacation destination?

1...Yes

2...No

3. Was this your first time visiting Montana?

1...Yes

2...No

4. During the past year, did you take any trips of 200 miles or more that took you outside of your home state?

1...Yes

2...No

4a. Do you recall that either you or your children visited a website called Montanakids.com?

1...Yes

2...No →SKIP TO Q5

4b.. Who visited the site?

1...Your children

2...Yourself

3...Both yourself and your children

4...Don't know

4c. How would you rate the site for....

| | Very Poor | Poor | Fair | Good | Very Good |
|--|-----------|------|------|------|-----------|
| Providing useful information | 1 | 2 | 3 | 4 | 5 |
| Being enjoyable for kids | 1 | 2 | 3 | 4 | 5 |
| Being enjoyable for adults | 1 | 2 | 3 | 4 | 5 |
| Increasing your interest in visiting the state | 1 | 2 | 3 | 4 | 5 |

5. Did you request information from the state of Montana within the past year?

1...Yes

2...No →SKIP TO INSTRUCTION AFTER Q6A

6. What prompted you to request information from the state?

1...I was thinking about taking a trip to Montana

2...I wanted to get more information about the state to decide whether to visit

3...I was already planning a trip

4...Other, specify _____

6a. Do you recall any advertising or promotions you saw for Montana prior to requesting information?

1...Magazine advertisement

2...Mailing received at home

3...Internet advertisement

4...Search engine link

5...Link on another internet site

6...Magazine article

7...Newspaper article

8...Other, specify _____

9...No, none

IF Q1_3 = 0 & Q4=1 SKIP TO Q21

IF Q1_3 = 0 & Q4=2 SKIP TO Q22

IF Q1_3 = 1 & Q6=2 SKIP TO Q11

7. Did you decide to travel to Montana before or after you requested this information?

1...Before

2...After

3...Don't remember

8. How much or little influence did this information have on your decision to travel to Montana?
Would you say it had...?

- 1...A great deal of influence
- 2...Some influence
- 3...Very little influence, or
- 4...No influence at all

9. Did the travel information influence how long you stayed in Montana?

- 1...Yes – Lengthened stay in Montana
- 2...Yes – Shortened stay in Montana
- 3...No – No effect on length of stay

10. What month was your most recent visit to the state?

- 1...January 2007
- 2...February 2007
- 3...March 2007
- 4...April 2007
- 5...May 2007
- 6...June 2007
- 7...July 2007
- 8...August 2007
- 9...September 2007
- 10...October 2007
- 11...November 2007
- 12....December 2007
- 13....January 2008
- 14....February 2008
- 15....March 2008

11. How far in advance did you plan your trip?

- 1...Less than 1 month
- 2...1 to 2 months
- 3...2 to 4 months
- 4...More than 4 months

12. Did you participate in or visit any of the following while in the state of Montana? ROTATE

1. Shopping
2. Site seeing
3. National or State Parks
4. Hiking
5. Small towns
6. Bird watching
7. Backpacking
8. Canoeing/kayaking

9. A rodeo
10. Dinosaur dig
11. Horseback riding
12. A dude ranch
13. Camping
14. Fly fishing/fishing
15. Snowmobiling
16. Alpine skiing (downhill or cross-country)
17. Fairs/festivals
18. Hot springs
19. Bicycling/mountain biking
20. Hunting
21. River rafting
22. Authentic attractions
23. A museum
24. Unique local restaurants
25. Mountaineering/mountain climbing
26. Rock climbing
27. Golf
28. Wildlife viewing
29. Other (please specify) _____
30. None of these

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

12a. Of these activities, please indicate if there were any that were a major influence when you decided to visit Montana. You may choose up to 3.

13. What was the primary form of transportation you used to get to Montana?

- 1...Plane
- 2...Car, van or RV
- 3...Bus
- 4...Train
- 5...Other (SPECIFY) _____

14. How many adults 18 years of age or older, including yourself, were in your immediate traveling party on your most recent trip? ENTER NUMBER: _____

15. How many children 17 years or younger were in your immediate traveling party on your most recent trip to Montana? ENTER NUMBER: _____

15a. Which best describes your travel group on your most recent trip to Montana?

- 1...Friends
- 2...Family
- 3...Family and friends
- 4...Couple
- 5...Business Association

6...Organized group/club

7...By yourself

8...Other (Specify)

16. How many nights (OVERNIGHT) did you stay in Montana?

ENTER NUMBER: _____

ASK IF Q16>=1

17. What were your primary accommodations used while visiting Montana on your most recent trip?

1...Hotel or Motel

2...Bed & Breakfast

3...Campground

4...RV park

5...Home of friends or relatives

6..Other (SPECIFY) _____

18. While you were in Montana, on average, about how much did you and your traveling party spend in Montana, on each of the following? ENTER AMOUNT FOR EACH CATEGORY PLEASE ENTER WHOLE NUMBERS, AND DON'T USE COMMAS, DOLLAR SIGNS OR PERIODS.

Trip Total

Lodging

Meals/food/groceries

Admission/Costs at attractions & parks

Including rentals, lift tickets etc.

Entertainment

Shopping

Transportation costs in Montana such as

Rental car, gasoline, taxis/shuttles etc.

Miscellaneous other things

19. Overall, how satisfied were you with your trip to Montana? Would you say you were...?

1...Very satisfied → **SKIP TO Q. 20.**

2...Somewhat satisfied → **SKIP TO Q. 20.**

3...Neither satisfied nor dissatisfied → **SKIP TO Q. 20.**

4...Somewhat dissatisfied

5...Very dissatisfied

19a. Why were you dissatisfied? _____

20. How likely would you be to take another trip to Montana? Would you say you would be...?

1...Very likely → **SKIP TO Q. 23.**

2...Somewhat likely → **SKIP TO Q. 23.**

3...Neither likely nor unlikely → **SKIP TO Q. 23.**

4...Somewhat unlikely, or → **SKIP TO Q. 23.**

5...Very unlikely → **SKIP TO Q. 25.**

21. Where did you visit on a trip that was over 200 miles away from home, and outside your home state? _____

22. Why did you choose not to visit Montana during the past year? ACCEPT MULTIPLES

- 1...Cost of air travel too expensive
- 2...Could not afford a trip/ other financial reasons
- 3...Did not receive information about Montana
- 4...No time for a trip
- 5...Personal or family illness/ problem
- 6...Montana not attractive or interesting
- 7...Visited another location instead of Montana
- 8...Prefer a location that's closer to home
- 9...Other reason (Specify) _____

23. In the next **two** years would you say you...?

- 1...Definitely will visit Montana
- 2...Probably will
- 3...Probably will not, or
- 4...Definitely will not visit Montana →**SKIP TO Q25**

24. In which season would you most likely visit Montana?

- 1... Winter
- 2...Spring
- 3...Summer
- 4...Fall

25. Please consider the following descriptions, and indicate how much each one describes Montana.

| How much do you agree that Montana... | Strongly disagree | | | | Strongly agree |
|---|-------------------|---|---|---|----------------|
| Is welcoming | 1 | 2 | 3 | 4 | 5 |
| Is engaging | 1 | 2 | 3 | 4 | 5 |
| Is entertaining | 1 | 2 | 3 | 4 | 5 |
| Is simplistic | 1 | 2 | 3 | 4 | 5 |
| Is full of places to discover | 1 | 2 | 3 | 4 | 5 |
| Is exciting | 1 | 2 | 3 | 4 | 5 |
| Is unique | 1 | 2 | 3 | 4 | 5 |
| Is fun | 1 | 2 | 3 | 4 | 5 |
| Has Western hospitality and friendliness | 1 | 2 | 3 | 4 | 5 |
| Is beautiful and scenic | 1 | 2 | 3 | 4 | 5 |
| Has arts and culture | 1 | 2 | 3 | 4 | 5 |
| Is relaxing | 1 | 2 | 3 | 4 | 5 |
| Is action-packed | 1 | 2 | 3 | 4 | 5 |
| Is adventurous | 1 | 2 | 3 | 4 | 5 |
| Is charming | 1 | 2 | 3 | 4 | 5 |
| Is full of wide open spaces | 1 | 2 | 3 | 4 | 5 |
| Is rejuvenating | 1 | 2 | 3 | 4 | 5 |
| Is refreshing | 1 | 2 | 3 | 4 | 5 |
| Is peaceful | 1 | 2 | 3 | 4 | 5 |
| Has more spectacular unspoiled nature than anywhere else in the lower 48 | 1 | 2 | 3 | 4 | 5 |
| Has vibrant and charming small towns that serve as gateways to natural wonders | 1 | 2 | 3 | 4 | 5 |
| Has Montanans who are passionate about their state and eager to guide visitors to unique four-season experiences that match each visitors interests | 1 | 2 | 3 | 4 | 5 |

26. How much influence would an attraction's promotion of local heritage and culture and/or preservation the environment influence your decision to visit?

1. No influence
2. Very little influence
3. Some influence
4. A great deal of influence

26a. How much influence would an attraction's promotion of its efforts to preserve the environment influence your decision to visit?

1. No influence
2. Very little influence
3. Some influence
4. A great deal of influence

26b. How involved would you say you are in community events or causes?

- 1...Not involved at all
2. Not very involved
3. Somewhat involved
4. Very involved
- 5.

IF Q3=1, SKIP TO Q28

27. In the past five years, how many times have you been to Montana?
ENTER NUMBER OF TIMES _____

These last few questions are for grouping your responses with others similar to you.

28. What is your marital status?

- 1...Married
- 2...Divorced
- 3...Widowed
- 4...Single/never married
- 5...DO NOT WISH TO ANSWER

29. Are you female or male?

- 1...Female
- 2...Male

30. Including yourself, how many people are currently living in your household?

ENTER NUMBER: _____ [if q30 = 1 skip to Q32]

31. How many children under the age of 18 do you have living at home?

ENTER NUMBER: _____

32. Which of the following categories best represents the last grade of school you completed?

- 1...High school or less
- 2...Some college/technical school
- 3...College graduate
- 4...Post graduate degree

33. Which of the following categories best represents the total annual income for your household before taxes?

1. Less than \$50,000
2. \$50,000 - \$74,999
3. \$75,000 - \$99,999
4. \$100,000 - \$149,999
5. \$150,000 - \$199,999
6. \$200,000 or more

34. What is your age? ENTER AGE: _____

35. What is your ZIP CODE _____

Thank you very much for taking the time to complete this survey!